Team Process Agreement

Date: 8/12/22 Course: CU-VIRT-FIN-PT-08-2022-U-B-TTH   **Section (day/time)**: Tue/Thu, 7-9pm

Instructor   Vinicio De Sola (vdesola@instructors.2u.com)
Team Members: Mandal, Dinesh; Conyea, William; Skylizard, Loki 'Billie'; Yan Huang, Gavnoudias, Stratis

1. What is the primary method of communication (ie. Slack, email, etc)? Slack with Zoom meetings

Slack/email response rule
What is the maximum delay for responding to Slack/email from team members? Under what conditions does it apply? (e.g. weekends, etc)

Primary method of communication: Slack, Zoom
Maximum delay for responding: Daily / Every other day (team members have been active on slack)

2. Hours per week of project work
On average, how many hours per week will each member work on the project? 8 (excluding meeting times)

3. Weekly meeting schedule
Consult your individual schedules, and find days and times that will work for all of you. List the days and times of meetings, and what platform you will use (i.e. Zoom, skype, slack video calls).

Meetings via Zoom; Communication via Slack
Meeting Times: (Default) class schedule: 10/11(Tue), 10/13(Thur), 10/18(Tue), 7pm - 9pm
Full Group Meeting Times: 10/9(Sun), 10/16(Sun), 10am - 12pm

Individual sub-group breakout sessions as needed (see sub-group assignments below); Availability:
    Conyea, William: available after 5pm daily;
    Skylizard, Loki 'Billie': Available anytime;
    Gavnoudias, Stratis: Available after 9pm weekdays, flexible on weekends;
    Yan Huang: Available Tue/Thur after 9pm, Friday - Sunday flexible;
    Mandal, Dinesh: Available evenings every day;

4. Other collective responsibilities and conduct
What does the team expect that every member will do? What are the shared terms of conduct and cooperation for the group?

Submit progress; Review work; Discuss issues/concerns/questions; Discuss next steps/goals; Respect all team members viewpoints; Give all chance to participate in discussions;

5. Individual members' roles and responsibilities
How can each member be reached? Who will submit assignments? What work will each member do?

In addition to responsibilities about content, group members can be assigned administrative roles (e.g. individual tasks such as uploading the presentation to slack or broad roles like project manager. While a project manager is not required, groups have found it useful to have someone take point on some of the following tasks: scheduled team calls, filled out Team Process Agreement document, ensured group made clear decisions on each call to move the project forward in a timely manner, ensure that group met the assignment requirements, review action items at the end of each call, and ensure that group is prepped for feedback session with instructor during office hours.)

We strongly encourage you to articulate specific roles and responsibilities. You do not need to get overly prescriptive, but it is important that your team clearly understands the division of labor. If you write something like "everyone will work equally on each component of the project," please make it explicitly clear to each teammate what that means. The high-level goal here is to set appropriate expectations.

Members names & contact (e.g. email, Slack name, etc.)	Roles and responsibilities
Mandal, Dinesh (Slack: Dinesh Mandal)	Project Manager; Integration Testing; Stock Data Collection;Visual Presentation
Skylizard, Loki 'Billie' (Slack: Loki Skylizard)	Quant Analysis; Performance Analysis; Visual Presentation; Integration Testing
Gavnoudias, Stratis (Slack: Stratis Gavnoudias)	Quant Analysis; Performance Analysis
Conyea, William (Slack: Will Conyea)	Visual Presentation; Stock Data Collection; Performance Analysis
Yan Huang (Slack: Yan Huang)	Stock Data Collection; Quant Analysis; Performance Analysis

6. Conflict resolution process
If a conflict within the group arises as a result of one or more members not adhering to the agreed responsibilities and codes of conduct, here are the steps to address and resolve the issue.

1. Write an email to the individual(s), ensuring that all group members are included in the email, with a detailed explanation of what problematic behaviors have been encountered, and suggest how the issue may be resolved. Invite the individual to explain their perspective, and be prepared to discuss the issue as a group towards potential plans for resolution. Copy the email text into a slack direct message and include all members of the group.

2. If the individual(s) do not respond within the agreed upon timeframe (email response rule), or you are unable to resolve the issue as a team, contact your instructor to try to help moderate discussion towards resolution.

3. If the issues are still not resolved, complete the [Team Process Request for Removal](#) form and submit to the Instructor. This will initiate a discussion-based process for either a final chance to resolve group issues, or to remove member(s) from the group.

7. Signatures

I participated in formulating these standards, roles and procedures, and understand that I am obligated to abide by these terms and conditions. You can simply type your name into the signature field.

Name: Stratis Gavnoudias **Signature: SG**	**Name: Dinesh Mandal** **Signature: DM**
Name: loki skylizard **Signature: LS**	**Name: Yan Huang** **Signature: YH**
Name William Conyea **Signature WC**	